

We are currently updating our site; thank you for your patience.

# SERVICE

## **CALL SLA MANAGEMENT - ASSIGN A CALL**

By assigning a Technician, Driver, or Responsible Person to a call, identifies who will be working on the call.

If Tech Connect is <u>not</u> used, then the call will move to the **In Progress** status. The call centre person will accept the call on the Technician's behalf.

If the technician uses Tech Connect - he will accept the call on his device, and only then will the call move to **In Progress**.

Refer to the **Call State** column on the Call Listing screen, to see if the call has been assigned or not.

The call can be in either:

- status **New** with Call State **Unassigned**
- status New with Call State Awaiting Acceptance

Work and resources can be logged as the technician performs the required job. He may need to <u>Reject the Assignment</u> if the client is not available or out of his logistical route.

A technician can only be assigned to one call at a time. He will **End Work** then **Accept** the next call. Each additional assignment will follow a <u>prior res</u>olution.

The call can be re-assigned.



Set up the employee as a technician, if the person you wish to assign to a call, is an employee, but does not display on the list when searching in the assign screen.

## THE CALL SLA MANAGEMENT LISTING SCREEN

#### Ribbon Select Service > Call SLA



• The Call SLA Management Listing screen will display.

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## **ASSIGN A CALL**

• Click on the row selector in front of the Call.



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• Click on the **Assign** button.

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- The **Call Assignment** maintain screen will come up, with the following fields populated:
  - Detail: The Call Description.
  - Assignment Date and Time: 2 days from current date and time.



• Assigned By: The employee who is currently logged on.

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Create new Work Order 🗌	
Open Work Orders	
Open Windows *	User : Bianca 08/01/2024 Version : 2.5.1.4 v2514 Example Company

- Complete the details as follows:
  - Assigned To: Select the employee who will be doing this work.
  - **Detail:** This is pre-populated with the call description, but the detail can be added to for further instruction to the technician.



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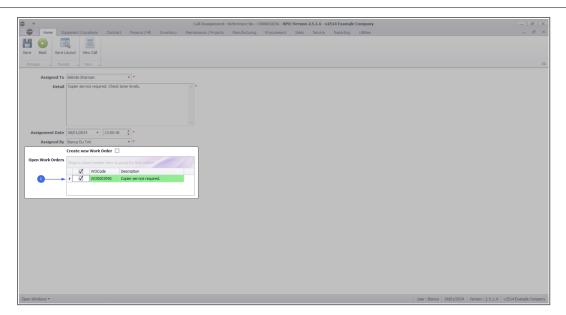
### WORK ORDER ASSIGNMENT LINK

• Next you will select to either link the assignment to the existing open work order or create a new work order. Do no select both flags.

## Link to Open Work Order

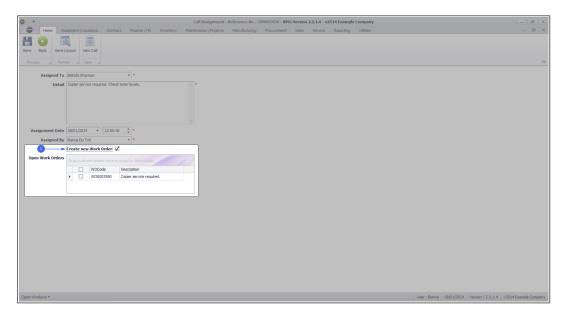
- For new calls, you will be linking the assignment to the existing Open Work Order.
- Click on the check box in front of the relevant **Open Work Order**.





#### **Create New Work Order**

- This feature is used if the technician needs to follow up on the same call, but for a different task, for instance when a call has been re-assigned. The assignment detail needs to be changed accordingly.
- Click on the Create new Work Order check box.





• Click on the **Save** button.

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- A message box will come up, noting:
  - Call No: [call ref no] has been assigned.

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• If using <u>Tech Connect</u> (<u>Auto Accept Call Assignment</u> company configuration flag set to **No**), the call will remain in status **New**, with the updated call State: **Awaiting Acceptance**. The call will display



on the Technician's call list on Tech Connect, where it can be accepted or rejected.

• Otherwise, the call will automatically be accepted and move to the **In Progress** status.

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#### **Related Topics**

- Service Introduction to Call SLA Management
- Service Call SLA Management Email Reminder
- Service Call SLA Management Close Call
- Service Call SLA Management Complete Call
- Service Call SLA Management Hold a Call
- Service Call SLA Management Pend a Call
- Service Call SLA Management Assign a Call
- Service Call SLA Management Call Hours Service Status
- Introduction to Call Hours Service

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